# Performance Budgeting

## Project Q7 PMP Report

**Version 1.0**
**March 28, 2011**

Prepared for:
Commonwealth of Virginia
VA-090724-PPC

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# Record of Changes/Version History

| Change/Version Number | Date of Change | Impacted Section/Description of Change | Person Entering Change |
|---|---|---|---|
| 0.1 - draft | 03/25/2011 | Submitted for COVA Approval | Lee Hodges |
| Version 1.0 | 4/12/2011 | Approved by COVA on 3/28/2011 | Lee Hodges |
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# Table of Contents

**1 Introduction ..... 5**
1.1 Purpose ..... 5
1.2 Organization ..... 5
**2 PB Project Management Plan ..... 6**
2.1 Activities Related to the Plan ..... 6
2.2 Content Changes to the Plan ..... 6
**3 PB Project Budget Plan ..... 7**
3.1 Activities Related to the Plan ..... 7
3.2 Content Changes to the Plan ..... 7
**4 PB Project Communication Plan ..... 8**
4.1 Activities Related to the Plan ..... 8
4.2 Content Changes to the Plan ..... 8
**5 PB Project Performance Management Plan ..... 9**
5.1 Activities Related to the Plan ..... 9
5.2 Content Changes to the Plan ..... 9
**6 PB Project Procurement Plan ..... 10**
6.1 Activities Related to the Plan ..... 10
6.2 Content Changes to the Plan ..... 10
**7 PB Project Quality Plan ..... 11**
7.1 Activities Related to the Plan ..... 11
7.2 Content Changes to the Plan ..... 11
**8 PB Project Resource Management Plan ..... 12**
8.1 Activities Related to the Plan ..... 12
8.2 Content Changes to the Plan ..... 12
**9 PB Project Risk and Issue Management Plan ..... 13**
9.1 Activities Related to the Plan ..... 13
9.2 Content Changes to the Plan ..... 13
**10 PB Project Schedule Management Plan ..... 14**
10.1 Activities Related to the Plan ..... 14
10.2 Content Changes to the Plan ..... 14
**11 PB Project Scope and Change Management Plan ..... 15**
11.1 Activities Related to the Plan ..... 15
11.2 Content Changes to the Plan ..... 15
**12 PB Fit/Gap Plan ..... 16**
12.1 Activities Related to the Plan ..... 16
12.2 Content Changes to the Plan ..... 16
**13 Requirements Traceability Matrix and Requirements Traceability Matrix for Design for Phase 1 ..... 17**
13.1 Activities Related to the Plan ..... 17

13.2 Content Changes to the Plan ..... 17
**14 PB Data Conversion and Migration Plan ..... 18**
14.1 Activities Related to the Plan ..... 18
14.2 Content Changes to the Plan ..... 18
**15 Preliminary and Final PB Data Conversion and Migration Design ..... 19**
15.1 Activities Related to the Plan ..... 19
15.2 Content Changes to the Plan ..... 19
**16 PB Coding Structure and Data Standards Document ..... 20**
16.1 Activities Related to the Plan ..... 20
16.2 Content Changes to the Plan ..... 20
**17 PB Abbreviations and Glossary ..... 21**
17.1 Activities Related to the Plan ..... 21
17.2 Content Changes to the Plan ..... 21
**18 Preliminary and Final PB External System Interfaces Design Document ..... 22**
18.1 Activities Related to the Plan ..... 22
18.2 Content Changes to the Plan ..... 22
**19 Preliminary and Final PB Application Design Document and Addendum ..... 23**
19.1 Activities Related to the Plan ..... 23
19.2 Content Changes to the Plan ..... 23
**20 Preliminary and Final PB Report Design and Specifications Document ..... 24**
20.1 Activities Related to the Plan ..... 24
20.2 Content Changes to the Plan ..... 24
**21 PB Database Design Document ..... 25**
21.1 Activities Related to the Plan ..... 25
21.2 Content Changes to the Plan ..... 25
**22 PB Security Plan ..... 26**
22.1 Activities Related to the Plan ..... 26
22.2 Content Changes to the Plan ..... 26
**23 PB Organizational Change Management Plan ..... 27**
23.1 Activities Related to the Plan ..... 27
23.2 Content Changes to the Plan ..... 27
**24 PB Integrated Training Plan ..... 28**
24.1 Activities Related to the Plan ..... 28
24.2 Content Changes to the Plan ..... 28
**25 PB Test Plan ..... 29**
25.1 Activities Related to the Plan ..... 29
25.2 Content Changes to the Plan ..... 29
**26 PB Data Conversion and Migration SSIS Packages Document ..... 29**
26.1 Activities Related to the Plan ..... 30
26.2 Content Changes to the Plan ..... 30
**27 PB Performance and Capacity Planning Approach Document ..... 31**
27.1 Activities Related to the Plan ..... 31

27.2 Content Changes to the Plan ..... 31
**28 PB Configuration Management Plan ..... 32**
28.1 Activities Related to the Plan ..... 32
28.2 Content Changes to the Plan ..... 32
**29 PB Performance Test Plan ..... 33**
29.1 Activities Related to the Plan ..... 33
29.2 Content Changes to the Plan ..... 33
**30 PB Help Desk Plan ..... 34**
30.1 Activities Related to the Plan ..... 34
30.2 Content Changes to the Plan ..... 34
**31 PB User Documentation and Training ..... 35**
31.1 Activities Related to the Plan ..... 35
31.2 Content Changes to the Plan ..... 35
**32 PB Release Management Plan ..... 36**
32.1 Activities Related to the Plan ..... 36
32.2 Content Changes to the Plan ..... 36
**33 PB Disaster Recovery Plan ..... 37**
33.1 Activities Related to the Plan ..... 37
33.2 Content Changes to the Plan ..... 37
**34 Strategic Planning Requirements Traceability Matrix ..... 38**
34.1 Activities Related to the Plan ..... 38
34.2 Content Changes to the Plan ..... 38
**35 Agency Spend Plan Requirements Traceability Matrix ..... 39**
35.1 Activities Related to the Plan ..... 39
35.2 Content Changes to the Plan ..... 39
**36 PB Strategic Planning Functional Design Document ..... 40**
36.1 Activities Related to the Plan ..... 40
36.2 Content Changes to the Plan ..... 40
**37 PB Agency Spend Plan Functional Design Document ..... 41**
37.1 Activities Related to the Plan ..... 41
37.2 Content Changes to the Plan ..... 41
**38 PB Disaster Recovery Plan ..... 42**
38.1 Activities Related to the Plan ..... 42
38.2 Content Changes to the Plan ..... 42

# 1 Introduction

## 1.1 Purpose

The purpose of this document is to review the Performance Budgeting (PB) Project Management Plan (PMP) and each of its component documents, as well as to identify activities that occurred during Quarter 7, January 1, 2011 and March 31, 2011, of the project.

Now that the PB Configuration Management Plan is approved, this document will include all of the changes made to Non-Project Management  Plan Document Control Items as identified in the PB Configuration Management Plan since each Control Item was approved by COVA and baselined.

## 1.2 Organization

This document is intended as a summary for the Commonwealth of Virginia (COVA) Project Manager.  It is organized into a section for each document with the following subsections in each:

- Activities Related to the Plan
- Content Changes to the Plan

# 2 PB Project Management Plan

## 2.1 Activities Related to the Plan

- Specific activates related to the PB Project Management Plan are included in the supporting plan summaries in this document.

## 2.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 3 PB Project Budget Plan

## 3.1 Activities Related to the Plan

The following deliverables were accepted by COVA during Q7:

- PB Project Q6 PMP Report.
- PB Project Q6 Summary Report.
- CRs 62877 and 64237 (related to Exhibit D-7).
- Strategic Planning Functional Design Document.
- Agency Spend Plan Functional Design Document.
- Strategic Planning Requirements Traceability Matrix.
- Agency Spend Plan Requirements Traceability Matrix.
- PB Disaster Recovery Plan.
- PB Reporting CR January.
- PB Reporting CR February.
- PB Reporting CR March.
- PB Management Environment January.
- PB Management Environment February.
- PB Management Environment March.
- On-Line Help.
- Strategic Planning Business Process Re-Engineering.
- 5 BIDS Licenses.
- Systems Operations Manual – Part 1.
- Entered monthly project status reports into ProSight.

## 3.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 4 PB Project Communication Plan

## 4.1 Activities Related to the Plan

- Steering Committee presentations.
- PB Project Management Team meeting presentations.
- Agency Spend Plan and Strategic Planning Out-Reach Meeting and Webinars.
- Release 1.4 Webinar for Users.
- Meeting minutes for Steering Committee and PB Project Management Team created and distributed.
- Action item logs for Steering Committee and PB Project Management Team created.
- PB Project Repository updated regularly.
- Risk, Issue, and Change Management logs updated regularly.
- Entered monthly project status reports into ProSight.

## 4.2 Content Changes to the Plan

- None since COVA approval.

# 5 PB Project Performance Management Plan

## 5.1 Activities Related to the Plan

- None since COVA approval.

## 5.2 Content Changes to the Plan

- None since COVA approval.

# 6 PB Project Procurement Plan

## 6.1 Activities Related to the Plan

- Procurred office supplies.

## 6.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 7 PB Project Quality Plan

## 7.1 Activities Related to the Plan

- Created PB Project Q7 PMP and Q7 Quarterly Summary Report.
- Produced Biweekly Status Reports and presented in PB Project Management Team meetings.
- Conducted inspections (i.e., peer reviews and tech edit) of each deliverable prior to delivery to the client.
- Agency Spend Plan and Strategic Planning Out-Reach Meeting and Webinars.
- Action items created and assigned.
- Meeting minutes created and available on the PB Project Repository.

## 7.2 Content Changes to the Plan

- None since COVA approval.

# 8 PB Project Resource Management Plan

## 8.1 Activities Related to the Plan

- New tester joined the team; her exct role is still to be determined.

## 8.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 9 PB Project Risk and Issue Management Plan

## 9.1 Activities Related to the Plan

- Created a new risk, 67807, regarding budget risk related to VITA billing for technical issues.
- Re-ranked the project risks based on ongoing changes to the project.
- Presented updated risks to Steering Committee and PB Project Management Team.

## 9.2 Content Changes to the Plan

- None since COVA approval.

# 10 PB Project Schedule Management Plan

## 10.1 Activities Related to the Plan

- Schedule progress and deliverables reviewed in weekly internal PPC team meetings.
- Schedule progress and deliverables shared with PB Project Management Team during Biweekly Team Meetings.
- Schedule progress and deliverables shared with the PB Project Steering Committee.

## 10.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 11 PB Project Scope and Change Management Plan

## 11.1 Activities Related to the Plan

- Change Requests to affect the PB System created and under review

## 11.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 12 PB Fit/Gap Plan

## 12.1 Activities Related to the Plan

- None during this quarterly review.

## 12.2 Content Changes to the Plan

- None since COVA approval

# 13 Requirements Traceability Matrix and Requirements Traceability Matrix for Design for Phase 1

## 13.1 Activities Related to the Plan

- None during this quarterly review.

## 13.2 Content Changes to the Plan

- None since COVA approval.

# 14 PB Data Conversion and Migration Plan

## 14.1 Activities Related to the Plan

- None during this quarterly review.

## 14.2 Content Changes to the Plan

- None since COVA approval

# 15 Preliminary and Final PB Data Conversion and Migration Design

## 15.1 Activities Related to the Plan

- None during this quarterly review.

## 15.2 Content Changes to the Plan

- None since Q3 COVA review and approval

# 16 PB Coding Structure and Data Standards Document

## 16.1 Activities Related to the Plan

- None during this quarterly review.

## 16.2 Content Changes to the Plan

- None since Q3 COVA review and approval.

# 17 PB Abbreviations and Glossary

## 17.1 Activities Related to the Plan

- Utilized the abbreviations used for coding and project management documents for the Performance Budgeting ("PB") Project.

## 17.2 Content Changes to the Plan

- None since COVA review (this was not a billable deliverable).

# 18 Preliminary and Final PB External System Interfaces Design Document

## 18.1 Activities Related to the Plan

- Refined the technical design whereby data from external systems is brought into the new PB System. Identified the data needs of the new PB System vis-à-vis the external systems, the technologies employed, the databases required to support interface operations (to include data models), the logical system architecture, the physical system architecture, the service designs, and the process flow.

## 18.2 Content Changes to the Plan

- Content Changes are part of CR67914. The changes are reflected in
- Table 1 below:

**Table 1 – Content Changes to PB External System Interfaces Design Document**

| | | | |
|---|---|---|---|
| 2.2 | 1/31/2011 | • Added RevenueClass to RevenueSource table in PBInterface database | Kazi Huque |

# 19 Preliminary and Final PB Application Design Document and Addendum

## 19.1 Activities Related to the Plan

- Worked on the design for the remainder of the Phase I functionality.

## 19.2 Content Changes to the Plan

- None since initial approval.

# 20 Preliminary and Final PB Report Design and Specifications Document

## 20.1 Activities Related to the Plan

- Refined the design and specifications of the reports that were produced as part of Phase I; also worked on CRs.

## 20.2 Content Changes to the Plan

- None since Q3 COVA review and approval

# 21 PB Database Design Document

## 21.1 Activities Related to the Plan

- None during this quarterly review.

## 21.2 Content Changes to the Plan

- None since Q5 approval.

# 22 PB Security Plan

## 22.1 Activities Related to the Plan

- None during this quarterly review.

## 22.2 Content Changes to the Plan

- None Since Q3 COVA Review and approval.

# 23 PB Organizational Change Management Plan

## 23.1 Activities Related to the Plan

- None during this quarterly review.

## 23.2 Content Changes to the Plan

- None since COVA approval.

# 24 PB Integrated Training Plan

## 24.1 Activities Related to the Plan

- Held two meetings regarding training and documentation for Phase 2.

## 24.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 25 PB Test Plan

## 25.1 Activities Related to the Plan

- Performed the test plan approach and high-level test methodology, scope, and logistics to validate the implementation of each component of the PB System for Release 1.4 and functionality for future releases.

## 25.2 Content Changes to the Plan

- There have been no changes made to the plan since the last review period. Once Phase 2, Phase 3, and CR replanning is complete, updates will be made.

# 26 PB Data Conversion and Migration SSIS Packages Document

## 26.1 Activities Related to the Plan

- None during this quarterly review.

## 26.2 Content Changes to the Plan

- None Since Q3 COVA Review and approval.

# 27 PB Performance and Capacity Planning Approach Document

## 27.1 Activities Related to the Plan

- Performed the approach for performance testing and capacity planning that is both systematic and practical.

## 27.2 Content Changes to the Plan

- None since COVA approval.

# 28 PB Configuration Management Plan

## 28.1 Activities Related to the Plan

- Performed the definition and controls for the PB System configuration items (CI). Listed all existing CIs for the project, how they are managed, and the process for adding a new item.

## 28.2 Content Changes to the Plan

- None since COVA approval.

# 29 PB Performance Test Plan

## 29.1 Activities Related to the Plan

- When the new Performance Budgeting System (PB System) goes live, it will be the central budgeting application for the Department of Planning and Budget (DPB) and several agencies. It is expected that different user populations, performing different specialized budget tasks, will make use of the PB System throughout the fiscal year and that usage spikes will occur just before task completion cutoff dates. Some of these tasks will be CPU, memory, and database intensive.

This document discusses the performance test plan, giving a high-level description of the following facets:

1. The performance criteria as specified in the project requirements.
2. The Team Foundation Server (TFS) Test Load Agent 2008 test tool and test rig architecture.
3. The test plan, which includes a discussion of the environments, schedule, and test methodology.

Performance Testing is still underway.

## 29.2 Content Changes to the Plan

- None since Q5 approval

# 30 PB Help Desk Plan

## 30.1 Activities Related to the Plan

- The Performance Budgeting (PB) Help Desk Plan defines the services and activities required to coordinate and to respond to Problems and Service Requests made by the PB End-Users and Commonwealth of Virginia (COVA) technical staff. Since we have achieved Phase 1 Go-Live, Help Desk activities are underway.

## 30.2 Content Changes to the Plan

- None since COVA approval

# 31 PB User Documentation and Training

## 31.1 Activities Related to the Plan

- Held two meetings regarding training and documentation for Phase 2.

## 31.2 Content Changes to the Plan

- There have been no changes made to the documentation and trainnig since the Phase 1 acceptance of these deliverables.

# 32 PB Release Management Plan

## 32.1 Activities Related to the Plan

- Numerouse releases have gone into Production since Go-Live.

## 32.2 Content Changes to the Plan

- None since COVA approval, but expecting comments from COVA Project Manager on this document

# 33 PB Disaster Recovery Plan

## 33.1 Activities Related to the Plan

- None since COVA approval.

## 33.2 Content Changes to the Plan

- None since COVA approval.

# 34 Strategic Planning Requirements Traceability Matrix

## 34.1 Activities Related to the Plan

- Identified Requirements related to Strategic Planning.

## 34.2 Content Changes to the Plan

- Incorporated CRs into the approved RTM and resubmitted for approval. Will get sign-off on the updates once the Statement of Work for Phase 2, Phase 3, and CR updates is finalized.

# 35 Agency Spend Plan Requirements Traceability Matrix

## 35.1 Activities Related to the Plan

- Identified Requirements related to Agency Spend Plan.

## 35.2 Content Changes to the Plan

- None since COVA approval.

# 36 PB Strategic Planning Functional Design Document

## 36.1 Activities Related to the Plan

- Identified Requirements related to Strategic Planning.

## 36.2 Content Changes to the Plan

- Incorporating CRs into the approved Functional Design. This activity will continue to as part of the Phase 2, Phase 3, CR update. It will be finalzed when the replanning is complete.

# 37 PB Agency Spend Plan Functional Design Document

## 37.1 Activities Related to the Plan

- Identified Requirements related to Agency Spend Plan.

## 37.2 Content Changes to the Plan

- Incorporating CRs into the approved Functional Design. This activity will continue to as part of the Phase 2, Phase 3, CR update. It will be finalzed when the replanning is complete.

# 38 PB Disaster Recovery Plan

## 38.1 Activities Related to the Plan

- The Disaster Recovery (DR) environment is a mirror of the Performance Budgeting Production environment. It will host the same version of the PB System as the Production environment and maintain an up-to-date copy of its data. Should the Production environment become inoperable, the Disaster Recovery environment will be activated and traffic redirected to it at the discretion of the PB Project/Program Management Team. No activities were enacted since approval of this plan.

## 38.2 Content Changes to the Plan

- None since COVA approval. However, the COVA Technical Resource is obligated to make changes to this document to finalize it.